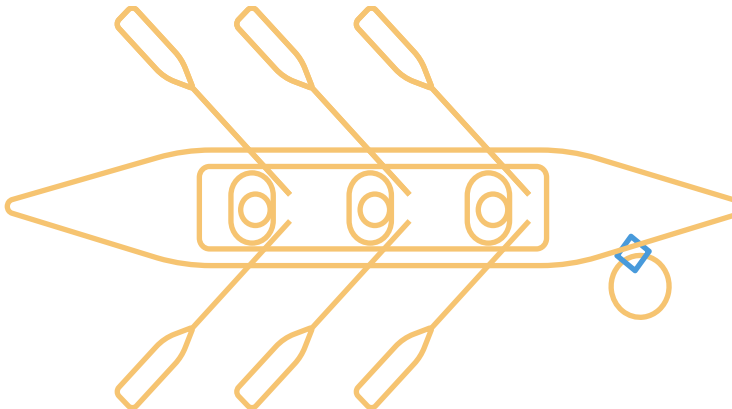




Growth360°

# Reach New Clients with Digital Marketing

Use this reference guide to better understand the importance of using digital marketing to reach a wider audience and retain your existing clients.



In this guide, you'll learn how to use digital marketing strategies, why digital marketing can help your company attract more qualified leads and engage with your existing clients.

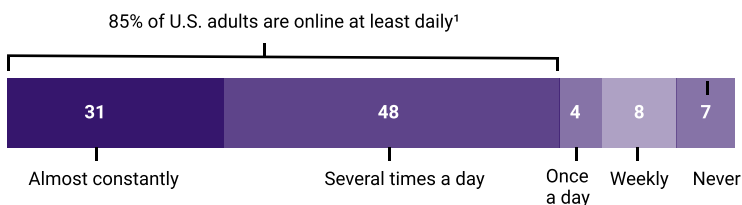
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# Digital Marketing is Here to Stay

With society becoming more and more dependent on technology and digital tools, it only seems natural that marketing would also follow this trend. Having a digital marketing strategy is just as important as your financial planning and sales process. It's non-negotiable to be successful in the future.

It's time to begin using digital marketing as the next step in your marketing strategy to gain influence with your client base and build your audience with prospective clients.



## The Digital Marketing Channels

There are numerous ways to look at digital marketing, but we typically break them down into the marketing channels listed below. Each channel uses different tools and within each channel the audiences are often demographically different.

For example, the numerous social media platforms attract different types of users. Facebook, for example, has an older male and female audience, Twitter has a more affluent male and female audience, while Instagram is used predominantly by younger females. Understanding the channels and who you want to acquire as clients is key to running a successful digital marketing program.

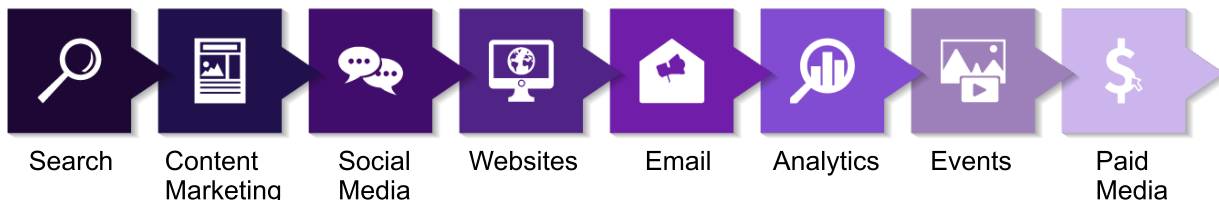
It's crucial that you have a planned approach for how you engage with your primary target audiences and your niche audience through your digital marketing efforts. What channels will you use to communicate with them? How often will you be in contact? Prepare yourself by planning ahead.

# 99%

of people check email daily.<sup>2</sup>

# 145

The average user spends 145 minutes per day on social media.<sup>3</sup>



<sup>1</sup><https://www.pewresearch.org/fact-tank/2021/03/26/about-three-in-ten-u-s-adults-say-they-are-almost-constantly-online/>

<sup>2</sup><https://blog.hubspot.com/marketing/email-marketing-stats>

<sup>3</sup><https://www.statista.com/statistics/433871/daily-social-media-usage-worldwide/>

# Benefits of Digital Marketing

The digital marketing world is continually expanding; there's always more to learn but that means there's also the potential for you to use it to your advantage.

- Targeted messages for audiences
- Measurable results
- Strong ability to automate
- More cost-effective
- Scaling your business and clients

## MarketingCentral Quarterly Plan

The Cetera Advisor Marketing team compiles a step-by-step quarterly marketing guide. Set up a time to walk through the quarterly plan with your Growth Officer.

[DOWNLOAD YOUR PLAN](#)

INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
<b>Starting Out</b> Investing Stage 1 20s to 30s: Simply stated personal finance tips, ideal for connecting with the next generation of clients.	WEEK 1	See Jan. Financial from Cetera Advisor Marketing	See Jan. Financial from Cetera Advisor Marketing	<b>Paper Investing Event</b> This program will help the advisor understand the importance of the paper investing event and how to use it to attract new clients. It will also provide a checklist of items to prepare for the event.
	WEEK 2	See Jan. Financial from Cetera Advisor Marketing	See Jan. Financial from Cetera Advisor Marketing	
	WEEK 3	See Jan. Financial from Cetera Advisor Marketing	See Jan. Financial from Cetera Advisor Marketing	
	WEEK 4	Fiscal Check and Resolutions	See Jan. Financial from Cetera Advisor Marketing	
	WEEK 5	Sharing Critical Documents	See Jan. Financial from Cetera Advisor Marketing	
<b>Building Wealth</b> Investing Stage 2 40s to early 50s: Communications focused on investors who are accumulating wealth and creating a need for the future.	WEEK 1	See Jan. Financial from Cetera Advisor Marketing	See Jan. Financial from Cetera Advisor Marketing	<b>Paper Investing Event</b> This program will help the advisor understand the importance of the paper investing event and how to use it to attract new clients. It will also provide a checklist of items to prepare for the event.
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	WEEK 3	See Jan. Financial from Cetera Advisor Marketing	See Jan. Financial from Cetera Advisor Marketing	
	WEEK 4	Communications Focused on Investors who are accumulating wealth and creating a need for the future.	See Jan. Financial from Cetera Advisor Marketing	
	WEEK 5	Sharing Critical Documents	See Jan. Financial from Cetera Advisor Marketing	

# Understanding Your Client's Journey

Identifying and understanding your target audience can help you tailor your messaging to directly address your prospect's needs. Part of creating the right content and messaging that will resonate with your target audience is understanding where they are in their journey. Use a marketing funnel to help you get a better idea of who you are speaking to and what steps you need to take to move them forward.



**Awareness** – Attracting new people who are currently unaware of your brand.

**Consideration** – Standing out among your competition so that new audience members remember you.

**Conversion** – Compelling your audience to take action and make a purchase.

**Loyalty** – Staying top-of-mind and keeping your audience engaged after they've purchased.

**Advocacy** – Building enough trust with your clients that they want to recommend you to others.

# Focus on Core Marketing Channels

<b>Website</b>	Your company website is the most important and effective marketing tool for communicating who you are to both current and future clients.
<b>Social Media</b>	Growing your following and getting engagement are the only ways to succeed in social media. Engaging with your followers and community can reap huge rewards.
<b>Search</b>	Search marketing is all about being in the right place at the right time. Write content about problems and solutions for people looking for answers.
<b>Email</b>	Email marketing allows you to reach an already engaged audience efficiently. Delivering the right message to the right audience makes email a highly effective marketing channel.

## MarketingCentral Automations

The MarketingCentral suite of tools provides an enormous amount of regular compliance-approved content for you and your team to use. The library of content is created and automatically distributed across your marketing channels like website, social media and emails.

For example, the MarketingCentral Quarterly Plan provides social media content suggestions for different audience types. Use this plan to help build your social media presence.

## Digital Marketing Goals

To be thoughtful and deliberate about your digital marketing strategy, there are some tasks to plan for on a weekly and monthly basis. The time and effort it takes to update your traditional marketing strategies can now be used for your digital marketing strategies instead. Analytics are a key part of a digital strategy, and using SMART goals can help you know when you are having success.

### Make your goals clear and reachable

**Specific** - simple, sensible, significant  
**Measurable** - meaningful, motivating  
**Achievable** - agreed upon, attainable  
**Relevant** - resourced, results-based  
**Time bound** - time-based, time-sensitive

### Regular Tasks to Set as Goals

- Post on social media
- Outline a content creation plan
- Update your website
- Write marketing emails to clients
- Consider creating online ads
- Create a strategy for your quarterly/yearly digital marketing efforts
- Keep yourself accountable to your strategies

# Generating New Leads

## Pay-Per-Click Ads

This is a digital marketing tool that enables your business to only pay for the advertisements consumers click on from a given search engine. Pay-per-click ads can:

- Target specific clients
- Drive sales and traffic
- Generate new exposure to your business

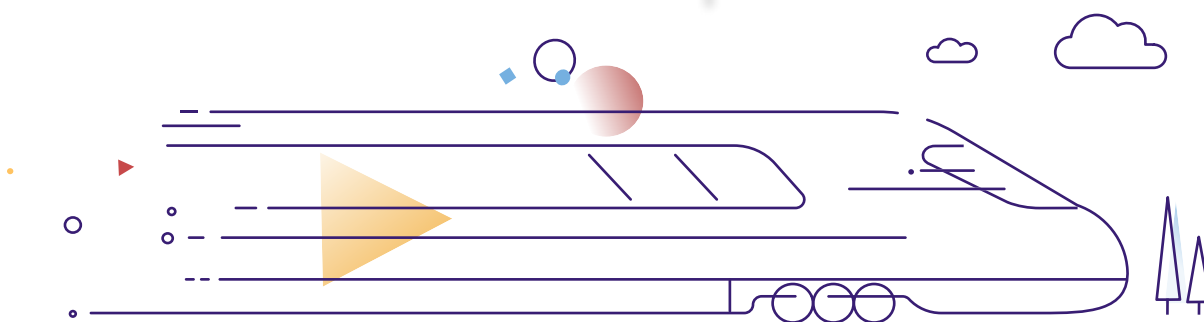
You can set up these ads based on keywords, audience and ad groups.

## Lead Generation Tools

These tools help you increase the conversion rate on your website or bring in more relevant traffic to your website and your business.

A few of these tools are:

- Smart Asset
- Riskalyze
- Fit to Retire
- Intercom
- Proof



# Digital Marketing Compliance Safeguards

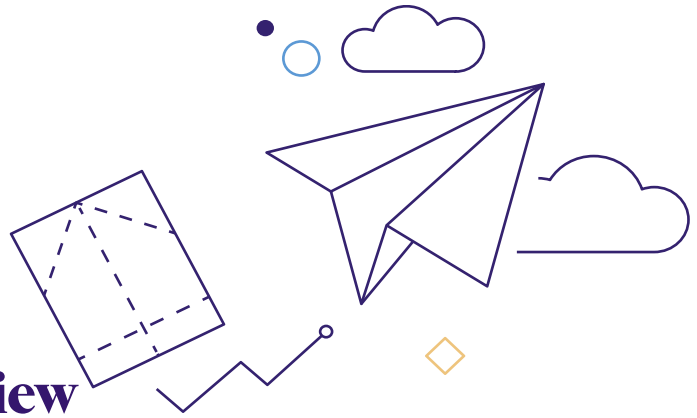
Staying compliant is vital to protect you and your company's reputations. Take care to avoid language on your website that sounds promissory or misleading. Use clear, accessible language on every page. These quick steps can help you ensure you're following compliance guidelines and protecting your business.

## 5 Simple Steps to Safeguard Your Firm

1. Learn about the risks: talk with your legal or compliance department. Review Cetera's social media policies and take the Social Media training course in the SmartWorks Learning Center.
2. Get clear guidelines on how and where you should use specific language. What kind of language do you need to avoid? What disclosures are needed and where should they appear?
3. Establish guidelines for reviewing materials and set up approval hierarchies. Make sure your whole team is aware of these protocols.
4. Verify your digital marketing content has all the required disclosures.
5. Whether it's you personally, your compliance officer or a trusted vendor, make sure that someone is watching for errors and the correct changes are made before the content goes public.

# Growth360°

## Digital Marketing Overview



Success in digital marketing is all about aligning your marketing plans with your business plans and executing strategies that logically make sense. MarketingCentral, Cetera's digital marketing platform, can help support your digital marketing efforts and make updating content easier.

Use the stages below to assess where you are today and find new opportunities for growth.

### Visible

Success at the first level is about understanding the basics of digital marketing and getting a better idea of where and how you can effectively communicate with prospective and existing clients. Start by establishing your social media profiles, making sure your website is up to date and you are actively sending emails to prospects and clients monthly.

### Active

Success at the second level is about creating the right messaging for your audience and sending it through the proper channels. Following the MarketingCentral Marketing plan and using the MarketingCentral automations can help you create and deliver your messaging in a way that's time-efficient and effective.

### Optimized

The third level is about creating and working toward meeting realistic and obtainable goals. Part of obtaining your goals may be using paid media and paying for ads as a way to reach a wider audience and bring in more traffic to your website and company.

# MarketingCentral by Cetera

Build a strategy for growth with MarketingCentral, a powerful suite of tools built exclusively for you by the Cetera Marketing team. MarketingCentral is a comprehensive multi-channel platform with pre-approved email templates, social media content, downloadable event kits and presentations and so much more that you can fully customize to meet your business and client needs. Take the guesswork out of marketing and focus on growing your business.



Learn more at <https://fmgsuite.com/marketingcentral/experience/cetera-resources/>



## QuickStart Guide

Get up and running with this step-by-step guide to MarketingCentral.



## Interactive Webinars

Register for an interactive webinar to learn more about the MarketingCentral tools and get assistance with any questions.



## Marketing Strategy & Best Practices

Put together a solid client and prospect outreach strategy designed to get results with the help of this straightforward guide.



## MarketingCentral Automations

Explore opportunities to automate marketing communications across email, social and print.



## Growth Guides

Drive leads and increase prospect conversion rate with these Client Prospecting and Conversion Guides.



## Events Guide

Leverage MarketingCentral and these tips to plan, manage and promote your next client or prospect event.



## 2021 Marketing Calendar Template

Plan the next year of marketing content and strategy with this calendar template.



## Required Record Retention

MarketingCentral is an approved record retention tool.



## Using MarketingCentral as a Team

Use these tips to personalize a profile if you are using MarketingCentral as an ensemble team or program.

## Additional Digital Marketing Resources

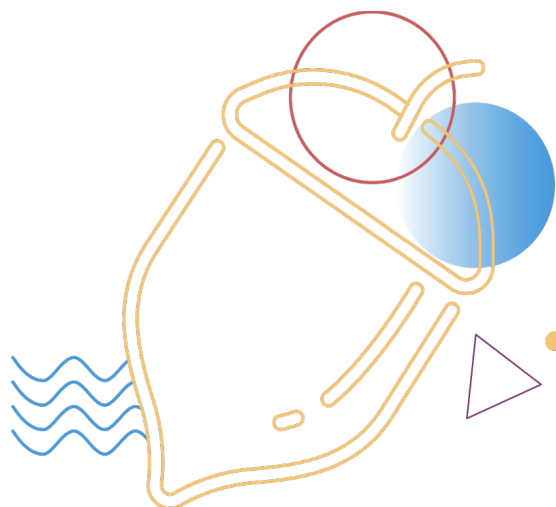
[Quarterly/Yearly Marketing Calendar](#)

[Marketing Strategies and Best Practices](#)

[Social Media Best Practices](#)

[Using MarketingCentral as a Team](#)

[MarketingCentral Automations](#)



'Cetera Financial Group' refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. Located at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670. Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.